

THE Legal Secretary®

VOL. 63, BOOK 2

LEGAL SECRETARIES, INCORPORATED

NOVEMBER 2008



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THE LEGAL SECRETARY, published quarterly by Legal Secretaries, Incorporated, is a benefit of membership. Subscriptions for members are included in annual dues. Subscriptions are available to non-members, at a cost of \$25 per year (4 quarterly issues), through LSI Corporate Office, P.O. Box 660, Fortuna, California 95540-0660. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered and is made available with the understanding that the publisher is not engaged in rendering legal or other professional service. If legal advice or other expert assistance is required, the services of a competent professional person should be sought. The opinions expressed by the individual authors are their own and are not necessarily those of Legal Secretaries, Incorporated.

Editor: DEBORAH RICKERT, CCLS Printed by: MONARCH LITHO, INC.

Building Membership Through Education

LSI President



Christa Davis is President of Legal Secretaries, Incorporated and a member of Livermore-Armador Valley Legal Professionals Association. Christa started her legal career as a legal secretarial trainee in 1987. She has been working for Staley Jobson, a family law firm in Pleasanton since 1989, where she is currently the Administrator. Christa lives in Castro Valley with her husband and daughter.

Building Membership through Education – my theme for the current year – took form at the August Quarterly Conference held in San Jose August 22 – 24, 2008. Santa Clara County LSA was the hosting association and they did a fabulous job putting together a fun but educational conference. Conference attendees experienced the new conference schedule – a morning and an afternoon session, a plethora of educational opportunities, and a lighthearted themed weekend. The new schedule allows more time for our members to attend as many workshops as possible, as well as some time to network and relax. This was a great kick-off and a good indication of what we have to look forward to this year. I hope you were able to be a part of the conference weekend. However, the November Quarterly is just around the corner if you were unable to attend in August.

Building membership and providing more educational opportunities on the local association level were the main topics of conversation at conference. This is great because it shows that our members are cognizant of the challenges ahead and are discussing and exchanging ideas to resolve the situations. Recognizing the issues is the first step to resolution. Education is the mainstay of LSI, and the LSI officers and chairmen are working hard to offer more educational workshops, and work with the local associations to improve their educational opportunities.

Six Legal Specialization Section workshops were offered at the August Quarterly Conference, and the evaluations received from the attendees of these workshops gave rave reviews asking for more of the same.

California Certified Legal Secretary Chairman, Astrid Watterson, CCLS, moderated a very informative workshop about her flagship CCLS Study

Group, which was well attended. As you will read more about in this magazine, Astrid has put together a 23-week comprehensive study group available to all LSI associations. This is an exciting first for LSI since the CCLS program was established in 1988. This program will prove to be the pilot program for future CCLS study groups sponsored by LSI. I hope associations wanting to provide a quality CCLS study group to its local legal community will take advantage of this pilot program.

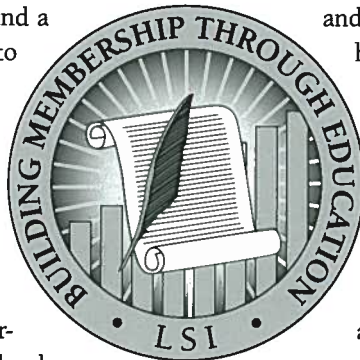
LSI Vice-President, Brooke Atherton, CCLS presented a Chapter Achievement Program, and provided useful information and handouts to those in attendance.

At the 2008 Annual Conference, eighteen associations participated in the program. I believe many more associations could benefit from the Chapter Achievement Program, and we would like to see the number of participating

associations double this year. Group participation is the key to this program

and your association will be surprised to see how simple acts of involvement can bring the members together and also realize Chapter Achievement points. The Chapter Achievement Program application is available to download from the LSI website (www.lsi.org). I encourage all members to take advantage of an opportunity to work together and benefit your association.

The Legal Specialization Section Leaders are working hard to provide quality speakers and interesting topics for the conferences, the Fall Regional and the Spring Regional. Attendance at the Regional workshops has fallen substantially, but our Section Leaders are looking in to alternative locations that are closer to airports, making it easier for members to attend future regional workshops. As always, the Section Leaders are open to ideas and suggestions.



LSI offers six Legal Specialization Sections: Civil Litigation, Criminal Law, Family Law, Law Office Administration, Probate/Estate Planning, and Transactional Law. Are you a member of one or all six of the Legal Specialization Sections? If not, why not? Investing \$20 to join one section or \$75 to join all six sections (as an LSI member) provides the opportunity to attend up to twelve educational workshops each year for free. It also provides discounted fees to attend the Fall and Spring Regional workshops. Math was never my strong point, but by my calculations, if an LSI member joins all six sections and attends twelve workshops during the year, that works out to \$6.25 per workshop - including MCLE credits! What employer would say no to a \$6.25 workshop to enhance their employee's legal knowledge?

In the August 2008 issue of *The Legal Secretary*, Jan Sones of San Diego LSA wrote a "letter" to her employer stating the reasons why the employer should pay her LSI dues, monthly meeting fees, and Legal Specialization Section dues. I recommend every member of LSI who must pay their own fees read the article, and then discuss the situation with your employer. It is quite possible that your employer just hasn't given the matter any thought and would be more than willing to cover the costs of continuing your education. It certainly cannot hurt to ask.

The November Quarterly Conference will be held at the beautiful Mission Inn, in Riverside, hosted by Riverside LPA. Legal Secretarial Training/Seminar Chairman, Cindy Illum Jones, of Stockton-San Joaquin County LPA will be presenting "Seminars/Workshops from Topics to Presentation." Cindy's workshop promises to provide some tried and true methods of presenting educational workshops. I hope that you will make it a point to attend this workshop.

We will also be offering a workshop moderated by LSI

Historian, Denise Lopes, CCLS on putting together a history book or scrapbook without spending an exorbitant amount of time or money. Having been the LSI Historian for Mary S. Rocca, LSI Past President 2004-2006, Denise has the knowledge, experience and background necessary to moderate this workshop. Presenting your local association president with a history book at the end of their term is a wonderful way to show your appreciation for a job well done. It is a great way to preserve the history of your association that will be fondly viewed for years to come. Denise is eager to provide shortcuts and tips to help get you started creating your history book or scrapbook, so please plan to attend.



At each conference, a luncheon is held for the local association presidents as a forum to discuss issues of concern, and trade information and ideas. In August, the presidents discussed what it takes to step outside their own comfort zone in order to become a better leader. Each president has at least one goal they would like to achieve this year, and we will focus on working towards those goals at each luncheon. The local association presidents are eager and anxious to achieve their goals, but they need the assistance of each member to help them work towards those goals, so please don't

be shy – step up and volunteer to assist your association. The experiences you gain will be well worth the time invested.

Our year is just beginning, and now is the time to get involved. Make the most of your membership in LSI. Education, network, personal and professional development - it is all there for the taking, you just have to reach out for it, but it will only happen if you take those initial steps. Break those imaginary comfort zone barriers. Grab the hand of a fellow member if you are unsure of taking those steps alone and together you can help to build your association – our organization - through education. □

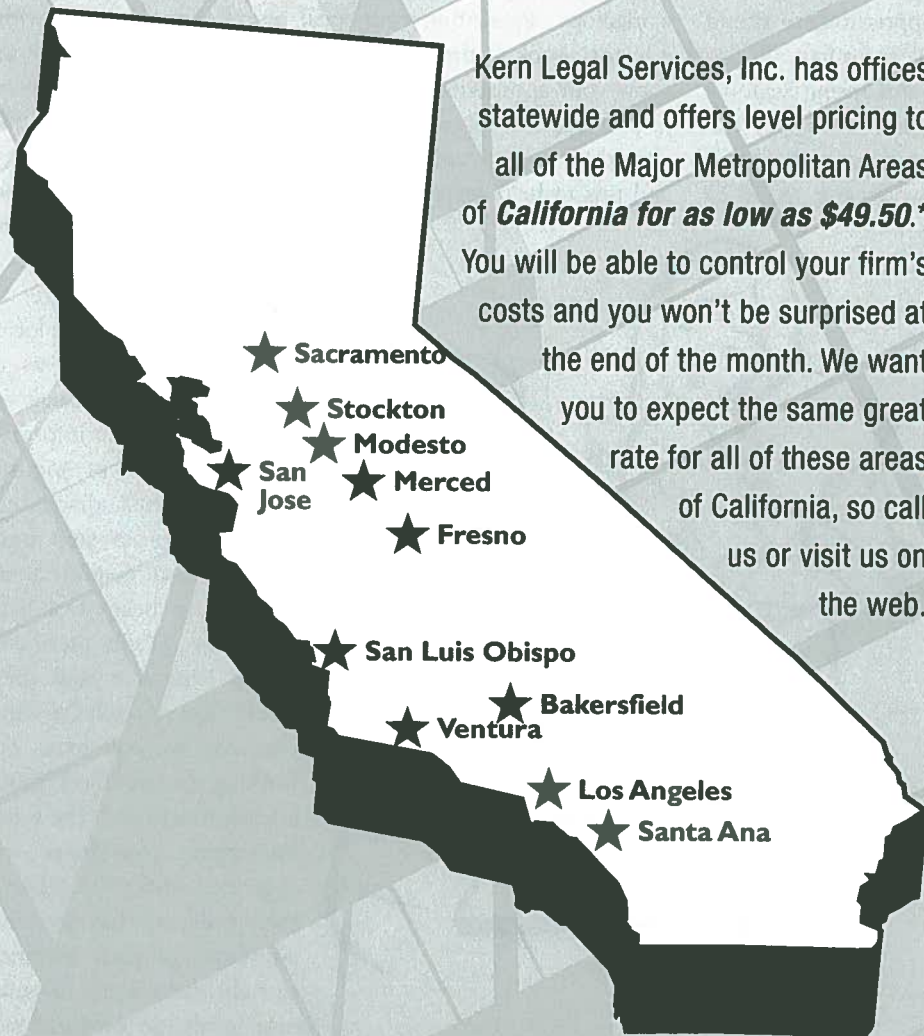


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Join Us Under The Harvest Moon

Submitted by
**Second Quarterly
Conference Co-Chairs**



Kay J. Bliss, PLS, CCLS is Co-Chairperson for the November 2008 conference. She has been employed in law firms all her working life and has been employed by Best Best & Krieger LLP for more than 27 years. Kay has held a number of chairmanships with LSI and is currently the LSI Parliamentarian.

Riverside Legal Professional Association is looking forward to greeting the members of Legal Secretaries, Incorporated for its Second Quarterly Conference at the beautiful Mission Inn in downtown Riverside November 14-16, 2008. Our members are working hard to make this a memorable event for one and all.

For those who have never been to the Mission Inn, you will find it a very unique piece of architecture with lots of nooks and crannies to explore. By the time you arrive, most of the holiday decorations will be up along with the million or so lights they put up every year. They have a special lighting ceremony the day after Thanksgiving.

The building originally started out as a small tavern on the stagecoach route. It was enlarged a bit-at-a-time until it was a full blown hotel – and the owner, Frank Miller, had a place to display the many artifacts he picked up during his world travels. Duane Roberts, the “Keeper of the Inn,” purchased the hotel a number of years ago and has made it a truly wonderful place to visit. They often have dignitaries staying at the hotel and over the years it has been featured in a number of movies and commercials. (Riverside locals love to set their weddings at the Inn with its picturesque settings and elaborately decorated Chapel.)

The members of Riverside LPA are looking forward to sharing our Mission Inn with you. Our Friday evening reception will be held in the beautiful Atria where Draper’s and Damon’s will

present a classy fashion show – including holiday attire. The Saturday evening banquet and Sunday morning brunch will be held in the Galleria (with its Tiffany stained glass windows). While there is no specific dress code for this weekend, business casual is always welcome, and the setting is a good place to show off your lovely outfits at the banquet.

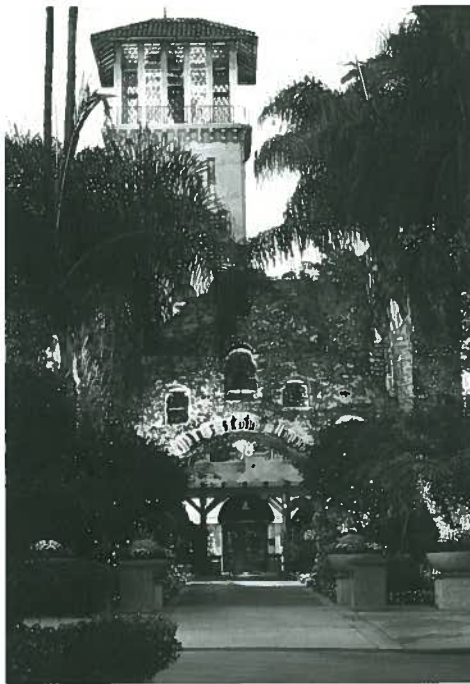
Finding eating places in the area will not be a problem. The Mission Inn has Duane’s Prime Steaks & Seafood (for elegant dining), the Mission Inn Restaurant, Bella Trattoria Italian Bistro and Los Companas Mexican Cuisine & Cantina. There are also a number of other eateries within a two block radius to fit everyone’s budget. Check out www.missioninn.com to take a virtual tour of the Inn with its award winning restaurants and Kelly’s Spa.

A number of antique stores and other small shops are very close for your shopping pleasure and other shopping malls are within a 15 minute

drive. If you find the time, stroll a couple of blocks down our Main Street Mall to the Riverside County Courthouse. It is one of the most beautiful courthouses in the State of California.

If you are flying in to Ontario International Airport, the Mission Inn has a free shuttle to the hotel. Contact them a day ahead of your flight to let them know when you will be arriving to make arrangements to be picked up.

Riverside LPA welcomes you to join us for a fun and educational weekend! □



REGISTRATION FORM - DEADLINE IS MONDAY, November 10, 2008

PLEASE MAKE ALL CHECKS PAYABLE TO "LSI"



Handout Only: \$15.00

The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these workshops have been approved for minimum MCLE/CLE credit of 1.25 hours each, by the State Bar of California.

Case Management/Electronic Case Filing Update for Central District Court

Submitted by
Orange County LSA



Jeffrey Allsteadt submitted this article on behalf of U.S. District Court Central. Jeffrey Allsteadt began his career in court administration in 1990 in the Michigan State court system working for the Oakland County Circuit Court. In 2000, he obtained his Masters degree from Central Michigan University. Over the years he has developed his expertise in court operations and management. In August of 2007, he joined the Central District of California in the federal court system as Assistant Deputy in Charge. He is currently enrolled in the Federal Court Leadership Program studying the advancement of teleworking and court procedures in the federal court.

In January 2008, the United States Central District Court of California fully transitioned to the Case Management/Electronic Case Filing (CM/ECF) system for all case types. Electronic filing has numerous benefits when compared to conventional filing at the courthouse. These include, but are not limited to: ready access to case files; the ability to file court documents from any place at any time; immediate e-mail notification of court filings for registered users; and automatic and instantaneous electronic service of pleadings on all parties to an action (as opposed to conventional paper/mail/fax/service). Through regular electronic filing, attorneys and their staff will quickly recognize the enormous benefits the CM/ECF system offers.

General Order 08-02, the e-filing governing order, establishes the operating rules for the electronic filing of pleadings and papers. It is the function of the clerk's office to prepare a discrepancy form, if needed, when there is an error or oversight of those operating rules concerning an electronic filing. The clerk's office performs quality control check on all filed pleadings to ensure the electronic filing process is completed correctly. If a problem with the filing occurs, it is brought to the court's attention at which time it is the assigned judge's discretion to strike a document if the electronic filing is not completely satisfactory.

To help limit the possibility of having a document stricken, it is important to be aware of the most reported electronic filing issues:

- Use of an incorrect event code
- Failure to e-mail case initiating

documents within twenty-four hours after the paper filing

- Untimely delivery of courtesy copies
- Failure to e-mail chambers proposed documents in Word or WordPerfect format
- Contacting clerks or civil intake directly instead of the CM/ECF helpdesk

The improper selection of an event code, while electronically filing a pleading, is by far the most common mistake made. To aid in better understanding the available events from which to select, a complete list of civil and criminal event codes is posted on the court's website at support.cacd.uscourts.gov. For instance, civil events are broken down into categories, such as, other complaint filings, motions and petitions and applications. In addition to the complete event list, a search feature is built into CM/ECF to help aid users in selecting the right event for their filings. The search feature is found in the top blue bar of CM and is a great tool to use when starting the process of docketing a pleading.

Notice to the Court of updated attorney information is accomplished by the utilization of the "change of attorney information event." The event to electronically file the notice of the change of attorney form is located under the notices event category. You must file in each case when changes need to be made. For additional information regarding maintaining your account refer to the Court's website www.cacd.uscourts.gov/cmecf.

Failure to e-mail to the court file stamped

(Continued on page 8)

copies of your case initiating documents by the close of business the following business day, as required by General Order 08-02, could result in sanctions being ordered by the court. Submission of these documents must be made by e-mail to the intake e-mail box for the appropriate court division (the division to which the case is assigned). For your reference, the court's web address regarding this topic and the e-mail addresses for each division is support.cacd.uscourts.gov/civil_initiating_documents.

Additionally, the process to submit courtesy paper copies to the district court is a question commonly asked of the court's CM/ECF help desk by counsel. General Order 08-02, in Section 4d (support.cacd.uscourts.gov), states:

Courtesy Paper Copies. Unless otherwise ordered by the assigned judge, courtesy paper copies of all electronic filed documents must be delivered to chambers of the assigned judge no later than 12:00 noon the following business day. The courtesy paper copies must comply with Local Rule 11-3, i.e., blue backed, font size, page numbering, tabbed exhibits, etc., or otherwise directed by the assigned judge. The courtesy paper copy must be prominently labeled COURTESY COPY on the face page. The courtesy copy must include the NEF as the last page of the document. The court's CM/ECF website contains additional instructions by judges for delivery of courtesy copies.

Failure to e-mail chambers a proposed document, order or otherwise, in Word or WordPerfect format is another frequent oversight. A proposed document that accompanies a filing must be in PDF format and included as an attachment to the main electronically filed document. In addition to attaching a

proposed document to the main electronically filed document, all proposed documents need to be e-mailed to the generic e-mail address of the judge's chambers in Word or WordPerfect format along with a PDF copy of the main electronically filed document. A listing of judges' chamber email addresses can be found by logging into CM, then selecting utilities and then selecting miscellaneous.

Calling clerks or civil intake instead of the CM/ECF help desk with a docketing issue is a common procedural oversight.

Before contacting the court, be sure to review the HYPERLINK "<http://support.cacd.uscourts.gov/FAQ.aspx>" Frequently Asked Questions, where answers to the most common questions can be found. Many inquiries can be answered by the court's CM/ECF help desk. The CM/ECF help desk can be contacted by phone at (213) 894-0242 and/or e-mail at ecf_helpdesk@cacd.uscourts.gov, if further assistance is needed.

The CM/ECF system enhances the accuracy, management and security of records, while reducing delays in the flow of information resulting in a cost savings for the judiciary, bar and litigant, Judges, the court, and the public. All users now have the capability to access United States Central District Court of California electronic docket and case management information. Electronic filing is a technological change to the practice of law and to help in the transition, the court has developed various mediums for training. Live and online training classes are available for lawyers and support staff seeking electronic filing certification, an extensive list of frequently asked questions are available on the court's home webpage for reference, and a CM/ECF help desk is a phone call away to get questions answered. Time spent learning the CM/ECF system and becoming aware of common issues and how to resolve them as outlined in this article will help ensure a successful electronic filing. □



Top Ten Questions on Powers of Attorney for Health Care and Advance Health Care Directives

Submitted by
Conejo Valley LPA



Justin M. Alvarez, Esq. is an attorney practicing in Westlake Village focusing on wills, trusts, advance health care directives and other estate planning matters. He may be reached at (818) 224-7077 or at jalvarez@alvarez.firm.com.

Q. What is a power of attorney for health care and how does it differ from an advance health care directive?

A. A power of attorney for health care is an authorization for someone else to make health care decisions for you when you cannot make them for yourself. An advance health care directive generally includes a power of attorney for health care and directions to your agent and others concerning your health care preferences. It can also give directions to your agent and the court about other important issues, such as i) the person you would nominate as conservator; ii) your organ donation preferences; and iii) lifestyle choices you may not be able to express, such as wishes for continuing church participation, for outdoor activity or for living at home instead of in nursing care.

Q. Why is it so important for me to prepare a very specific advance health care directive?

A. In 2005, the entire country was presented the text-book case on why you should have an advance health care directive. The case of Terri Schiavo never would have seen the inside of a local newspaper, let alone the halls of Congress and the desk of the President, if she had prepared an advance health care directive. We saw the importance of clarifying one's wishes on such matters as comatose living, pain management and tubal feeding and hydration. Even ice chips and water through a straw were denied to Mrs. Schiavo. This is not what most people consider extraordinary care. Many advance health care directive forms present a false dichotomy: "spare no cost or effort to save me" or "end my life immediately should I face costly or extended treatments." Many doctors and hospitals interpret simple form directives as "Do Not Resuscitate" orders. These forms neglect the

very different types of medical treatments available, and ignore similarly nuanced ethical and end of life moral choices. An advance health care directive is the opportunity to make such critical distinctions and spare family what we saw in Mrs. Schiavo's case.

Q. What role can and should my faith play in the drafting of my advance health care directive?

A. Your faith can and should play as important a role as it does in the rest of your life. The statutory and California Medical Association advance health care directives, discussed below, do not directly address the role of your faith, or the specific instructions that are consistent with that faith. An attorney-drafted advance health care directive can specifically and uniquely address key moral and ethical health care choices that are guided by your faith. This is a common reason for selecting an attorney to draft your advance health care directive rather than using a cookie-cutter form.

Q. Can anyone challenge the directions and authority I give to my agent in an advance health care directive?

A. It's partly up to you. Although certain persons can challenge in any circumstance, the Probate Code allows you to limit the right of some individuals to challenge your advance health care directive instructions. This could be very beneficial in circumstances, for example, where you and your agent share common beliefs about appropriate and inappropriate medical treatment, perhaps due to your common faith, while other family members may strongly disagree with your convictions.

(Continued on page 10)

Q. What happens in case of illness or accident?

A. It is important that you provide a copy of your advance health care directive in advance to your doctor, hospital, agent, back-up agent and any other person who could become aware of your illness or injury and who could provide the advance health care directive to the appropriate medical professional. In addition, many people also carry a copy of their advance health care directive with them when traveling. When you provide your advance health care directive to your doctor or hospital, it may be helpful to follow up with them and ask if they have questions or if there are any aspects of your advance health care directive with which they feel they cannot comply.

Q. What happens if I am involved in an accident or other emergency away from home?

A. Aside from those ideas above, two options are available for making your advance health care directive available to hospitals and medical professionals should you fall ill or be involved in an accident away from home. First, the California Secretary of State keeps a registry of advance health care directives in which you can register your advance health care directive. In addition there are other national registry services that will register a copy of your Directive and make it available upon request. Under either of these programs, you can also carry a wallet card that tells medical professionals how to get a copy.

Q. How does a power of attorney for health care differ from a power of attorney for financial management?

A. Unless you name the same person in both, the person holding your medical power of attorney does not have authority over your financial affairs and vice-versa. Problems can arise when the two differ on what treatments are necessary and the value of the treatments. The person holding the power of attorney for health care may wish to authorize expensive medical treatments, while the person holding the power of attorney for financial management may not give authority to pay such costs. This could leave family, hospitals and care providers in a difficult position.

Q. What is a “statutory” advance health care directive?

A. Section 4102 of the Probate Code provides a standard

advance care directive that the Legislature has drafted and directed be honored throughout the State of California. This is often called a “statutory” advance health care directive. Because this form was drafted by a legislature trying to accommodate everyone in the state in a very short document, it is terribly inappropriate for most people. It presents few choices and even these are often stark and dramatic overstatements. On other matters of great importance it is silent.

Q. Which type of advance health care directive should I use?

A. For a very few people, the statutory advance health care directive provides all the choices and instructions that they would want. Similarly, the California Medical Association offers its own form of advance health directive which may address some people’s wishes. Because of the simplicity of the forms and current medical practice, however, many doctors and hospitals will interpret those forms as virtual “Do Not Resuscitate” forms. Those same doctors and hospitals will also consider nutrition and hydration, even mere ice chips, as extraordinary care. When a patient fills out one of these cookie-cutter forms, (statutory, CMA, and similar) the patient often wouldn’t expect such simple care to be excluded when they check that box. Consequently, many people find that their unique health care wishes, including related moral and ethical choices, are not adequately covered by the statutory and California Medical Association forms. In these cases, many people contact an attorney to draft an advance health care directive uniquely suited to their personal beliefs and wishes.

Q. How much does an advance health care directive cost?

A. For obvious reasons the costs can vary significantly. The statutory health care directive can be copied and filled out at virtually no cost. At the time of drafting of this article, the California Medical Association offers its advance health care directive kit for \$5. While uncertain what other counsel charge for advance health care directives, this author generally charges about \$75 to prepare a semi-custom advance health care directive based upon a very extensive questionnaire sensitive to key medical, faith and ethical issues that face us in these times. Very specialized and unique drafting is usually performed by attorneys on an hourly basis and so is subject only to the creative limits of the person requesting the advance health care directive. □

Announcing the Commencement of the CCLS Plan

CCLS Chairman

At the August 2008 LSI conference hosted by Santa Clara County Legal Secretaries Association, the newest legal education opportunity offered by Legal Secretaries, Incorporated to all local associations was unveiled. Many have asked what the California Certified Legal Secretary (CCLS) Plan is. The CCLS Plan is designed to be a 23-week simultaneous study group for associations and students wishing to take the March 2009 exam.

Participating in the California Certified Legal Secretary study group can be one of the most significant benefits any local association can provide to their local legal community. There are many reasons why an association can begin now to provide a program that can further educate their members and members of their local legal community in a structured environment.

I have prepared a program fit for all local associations who wish to participate. Instructors will be provided with all the necessary teaching and marketing materials to assist them in meeting their members' professional goals – becoming a CCLS.

The CCLS exam requires you to have sufficient knowledge in the areas of: Ability to Communicate Effectively; Legal Terminology; California Legal Procedures including, family law, civil litigation, corporations, probate and estate planning, and real estate; Legal Computations; Reasoning and Ethics; Law Office Administration; and Skills.

The CCLS Plan has been structured in such a manner that all core subjects that one can expect to be tested on will be covered through the use of various homework materials, pop quizzes, recap quizzes, handouts, presentations, and in-class activities. The course attempts to reach students

with varying learning methods. Great effort has been made to structure the weekly courses in such a fashion that it will benefit those students who do well by studying and reading, to those who prefer hands-on methods, and those who learn by discussion and lecture.

The class format has been designed to include a little of each learning method. A student and the instructor can expect a consistent class structure, which includes a pop quiz in the beginning, the lecture, a question/answer period or an in-class activity, a recap quiz, and a syllabus.

There are many reasons for an association to participate in the Plan, but ultimately it falls on the individual student who has set a personal professional goal to learn more about the legal field; sharpen their skills; and take advantage of the support participating associations are now offering.

Many ask why should they become a CCLS and if they will see a financial benefit to becoming one. My response to that question is that being a CCLS, from personal experience, is the most rewarding educational experience that one can achieve. Taking the CCLS exam and passing it does not guarantee that your employer will give you a raise, or that you can make more money, or even that anyone will recognize you for it outside of those in LSI. However, you personally, should notice the changes that begin to occur in yourself, in your self-confidence, in your work product, in your self-assurance, in how you carry yourself, in your grammar usage, in how you spot errors, in how you correct yourself, and in your knowledge of California legal procedures. We may not be able to change others, but sometimes to change the world around us we need to begin with ourselves. In time, your employer and those around



Astrid Watterson, CCLS, is a member and past President 2005-2007 of the Sacramento Legal Secretaries Association, and she is the current LSI California Certified Legal Secretary Chair. Astrid received her CCLS designation in 2003 and is a graduate from the University of California Stanislaus paralegal certification program. She is currently employed as a paralegal with the law offices of Somach Simmons & Dunn in Sacramento. Her primary focus is civil litigation with an emphasis in natural resources. Astrid has worked in the legal field since 1997 and has been teaching the Beginning Legal Secretary classes in Sacramento for four years and the CCLS study group courses over a year. She lives in Stockton with her husband Miles and two daughters, Alexis and Emily, and she commutes to Sacramento.

(Continued on page 12)

(CCLS Plan, Continued from page 11)

you will see the changes that becoming a CCLS has made in you. We cannot force anyone to set their personal goals on becoming a CCLS, but local associations can begin to offer the opportunity for others in the legal community to set their goals higher and include becoming a CCLS as one of those personal professional goals.

LSI is prepared to offer the assistance you need to succeed. LSI's Vice President, Brooke Atherton, CCLS, asked everyone what they had in their LSI toolbox. The availability of a structured CCLS Study Group Plan is one of many tools that LSI is prepared to offer you. The question is no longer how to prepare for and implement your very own Study Group, but when will you join us on our quest for personal and professional achievement?

I am pleased to inform you that 12 associations have taken up the challenge and will participate in the CCLS Plan.

Congratulations to: Alameda County (Mary Rocca, CCLS – Instructor), Butte County (Julie Edsill, CCLS – Instructor), Imperial County (Liz Adame, CCLS – Instructor), Long Beach (Paul Delp, CCLS – Instructor), Marin County (Jennifer Page – Instructor), Merced County (Lorraine Bettencourt, PLS, CCLS – Instructor), Mt. Diablo County (Maria Bishop, CCLS – Instructor), Orange County (Deborah Rickert, CCLS – Instructor), Sacramento (Elizabeth Bomke, CCLS and Astrid Watterson, CCLS – Instructors), San Francisco (Deborah Carter – Instructor), Santa Clara County (Joan Layte, CCLS – Instructor), and Stanislaus County (Dianne Mecca and Loretta Reib, CCLS – Instructors). By the time you read this article, these brave few will be knee-deep into the wonderful world of Gregg and California Civil Procedure. Best of luck on their journey and I will keep you posted on their success. □

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I Can Make A Difference!

Submitted by
El Dorado County LPA

My name is Dana Carlson and I am a proud member of the El Dorado County Legal Professionals Association. We are a small group compared to most of you out there, but the members involved in our group are mighty! I wonder if you, like most of us, have faced the same trials and tribulations that go along with recruiting new members and not only providing them with educational programs and challenging workshops, but most importantly keeping them motivated enough to attend the monthly meetings.

If there is anyone out there reading this article who has wondered if they should get involved and would really like to but are hesitant because of the commitments and obligations that come with becoming a member, keep on reading...

Becoming a member of your local organization is not only a very rewarding experience on many levels, but not every member needs to or is even asked to participate in any way other than enjoying the network contacts, workshops, continuing education opportunities, friendship, laughter and the sharing of ideas. For those of you who would actually like to become more involved, there are many options available that would indeed fit your schedule. We seem to be afraid to commit and volunteer because we are too busy with work and our personal lives, i.e. we have kids, other obligations, pets to take to

the veterinarian, and do not forget all the kids' activities. I am sure you will all agree that it is a joyful experience when we can fill all of our board and chair positions and take some of the load off of the few members who tend to multi-task and take on the responsibility for many of the small everyday duties needed to run our group (thank you all!).

I have 3 teenage boys, one is a sophomore in high school, just getting ready to drive who plays football and wrestles, an 18 year old just starting college and playing in the football program, and a 20 year old working full-time and going to college, all still living at home. Talk about a busy schedule! Yet, when I am able to get away and attend our local meetings as well as the LSI conferences, I leave feeling grounded and in touch with my friends and associates and feel motivated all over again to get out there and make a difference. And I always leave learning something new.

So consider this as a challenge to anyone out there to take a chance and see how easy it can be to make a difference. We do not hog tie and brand anyone if they fall short of their commitments, we all just pick up the slack until you can get back on track. Believe me, it is worth it at the end of the day and I cannot express to you how wonderful it feels when your peers praise you for a job well done, it doesn't get much better than that. □



Dana Carlson is the Bulletin Editor and Employment Chair for El Dorado County Legal Professionals Association. She has worked for the law firm of Zitomer & Roberts, P.C. since March 2000 as a legal secretary, working her way to a paralegal status shortly thereafter. She is an associate member of the El Dorado County Bar Association and lives in Cameron Park, California with her husband and 3 boys who all enjoy camping, fishing, and water sports.



Ode To The Legal Secretaries

Submitted by
Monterey County LSA



Ronald Granberg has been practicing law since June of 1978, and is a Certified Family Law Specialist with the State Bar of California Board of Legal Specialization. He is also a past President of the Association of Certified Family Law Specialists and the Monterey County Bar Association. Mr. Granberg is an instrumental part of our Association and our connection with our local Bar Association.

The following poem was originally published in the Monterey County Bar Association in March of 1992 by Ronald Granberg, Attorney at Law. With Mr. Granberg's permission we have pulled this from our archives and are pleased to share it with you. Mr. Granberg has been an Honorary Member of the Monterey Legal Secretaries Association since 1990. He has been a speaker at many of our meetings and taught many of our seminars, and has been our Officer Installation Marshall on numerous occasions.

Who can draft the perfect interrogatory:
Unobjectionable, but slightly derogatory?
The Keeper of thesaurus and dictionary-
The Monterey County legal secretary.

Who wields the summons and subpoena power?
Who determines the depo's date and hour?
The star of the judicial luminary
The all-powerful legal secretary.

You've drafted the complaint and alleged the venue;
Who will sniff at your pleading and forthwith
send you
To the books with the zeal of a missionary?
You know the answer-your legal secretary.

Every phrase, every prayer, every introduction,
Every Notice of Motion for Preliminary Injunction
Must be grammatically correct and address
issues squarely
To be typed by your legal secretary.

Counselor's reputation will quickly be tarnished
By an attempt to levy, attach or garnish
Without the advice of an extraordinary
And awesome legal secretary.

You've been Curtis'd, Silver'd, Phillip'd and Paik'd
You've been Duffy'd and Moody'd in the Fields
out back,
But you'll be reading your own obituary
The day you cross a legal secretary.

If you misplace a phrase or even a syllable
Your differences will become irreconcilable,
Her degree may be doctorate or honorary
But she knows words, your legal secretary.

Your mind might be wandering to food or sex
But you'd better draft properly that OEX,
Or you'll learn some new vocabulary
From your erudite legal secretary.

When we've lost Shift/F7 on our new computers
They'll be our F3's, that is, our tutors.
So technological that it's almost scary-
Your twenty-first century legal secretary.

Our legal victories they engineer;
They prepare our summations and our voir dire.
Indispensable, essential and necessary
We'd be bums without our legal secretaries.

When the courtroom erupts in spontaneous
applause,
When your jury is mesmerized by proximate cause,
It's due to that forensic visionary
Hat's off to the legal secretary!

My argument now stands submitted
Your staff's smarter than you are, so why not
admit it?
This statement may seem revolutionary,
But not to your legal secretary.

This poem is long, boring and worse,
But you must allow me just one more verse.
I break out in poetry only rarely
But my muse is the legal secretary.

We hold their talents and efforts in awe,
They're the unsung heroes of the practice of law;
Their names belong on our stationery!
Thank God for our legal secretaries! □

Seminars/Workshops From Topic To Presentation

**Legal Secretarial
Training/Seminar
Chairman**

So you have accepted the commitment of filling the training chair for your local association. Great! Now what? Some of our associations have their training seminars/workshops down to a well-oiled machine, and consistently provide their communities with high level legal programs. With these associations, the new chair steps in and, Voilà, instant seminar, all planned out step by step and wrapped up with a pretty bow on their speaker's gift. However, some unlucky local association chairs do not even have a file passed on to them. More unfortunate yet are that some local associations have no training chair at all. Unfortunately, the latter two scenarios are the most common within the LSI community today. LSI's roots are based in providing education to the legal support community and it is my hope that every association can present at least one program this year.

Well, finally to the point. I will, at the November LSI Conference, be presenting a workshop on "Seminars/Workshops from Topic to Presentation." At this workshop I will be facilitating a roundtable discussion featuring three panel members, representing and covering LSI associations from North to South. Our panel will be ready for an open forum question and answer discussion time focusing on what has worked with their three local associations when they have presented seminars and workshops. Also we will cover the basic steps from how important your topic is, to polling you local association members and local law offices, to see exactly what types of workshop or seminar your local community

is in need of. We will also cover how to choose a speaker. Little tips will be discussed, such as checking up on your speaker's outline and materials well prior to presenting, and how your speaker should not only be knowledgeable in the area you are presenting, but should have skills for public speaking, and humor consistent with the subject is a plus!

Attendees at the workshop will be encouraged to ask questions and participate in the open forum discussion as to what their needs are in anticipation of preparing for presentation of a seminar/workshop. I will also ask the panel and attendees to comment on LSI training materials, discussing what LSI materials and publications their associations have purchased,

what LSI has and exactly what materials the three panel associations have used in their preparation, planning, and presentation of successful workshops and seminars. Discussion of the need for joint educational programs by neighboring associations will be discussed.

Please plan to send someone from your association to attend and present your questions, as this will be a time for local associations to speak up and let LSI know what they need to assist them in effectively planning and presenting at least one workshop or seminar in the coming year. It is my goal that information obtained from the "Seminars/Workshops from Topic to Presentation," can be used to prepare a training checklist and template flyer, which can be posted on the LSI website for use by our members. Hope to see you there! □



Cindy Illum Jones is LSI Legal Secretarial Training/Seminars (CEC) Chair. She has been working as a Legal Assistant/Paralegal for 34 years, and is currently employed with Quinn & Kronlund, LLP, in Stockton. She resides in Lodi, California and is the grandmother of three, Madison, Anthony & Jacob.



Legal Secretaries, Incorporated

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- California Certified Legal Secretary®/MCLE/Paralegal CEU credits.
- Networking provides a forum for the exchange of information.
- Respect from employer when you pass on valuable information obtained at workshops and seminars.
- Professional and personal excellence.

*For more information, contact Margaret Tovar, CCLS, Legal Specialization Sections Coordinator.
Office: (213) 452-0115; Home: (562) 699-2006; mtovar@kbblaw.com*

What, Exactly, is a Delinquent?

Submitted by
Merced County LPA

When is a child a delinquent? Is it when he or she acts like one of the 1930's "Dead End Kids?" The Dead End Kids were brought to Hollywood in 1937 to make their first of several movies, but during the process they "ran wild around the studio, destroying property," including a truck they crashed into a sound stage. MGM chose not to use them again and sold their contract to Warner Brothers. Because of their antics on the Warner Brothers studio lot, they were eventually released from that contract, too.

I mention the Dead End Kids because I suspect they were probably considered "delinquent" at the time. In all probability, they were, in those days, poster boys for juvenile misbehavior. It's true they were rough, and they were pretty disrespectful of other people's things, but I'll bet they understood the basics of what was acceptable and they no doubt considered themselves to belong to the larger culture. I'm not so sure we can say the same about today's delinquents.

If the behavior of young criminals has gotten worse, has the label "delinquent" changed? I don't think so, but it is a matter of degree and the term can be confusing. I have spoken with many parents whose children were cited for misdemeanors or arrested for felonies, and many of them were afraid their children would, thereafter, be thought of as young criminals.

For the most part, true delinquents are juveniles under the age of 18 whose lifestyle is clearly anti-social. Delinquents are consistent in their determination to commit crimes and this gets them arrested, time and again. Most of their arrests also result in a finding of guilt. It is a matter of behavior and attitude, and it is a choice.

Delinquents are different from the kids who get into some trouble, either as a rite of passage,

naivety, or because they simply tend to learn the hard way. Many "good kids" get traffic tickets and sometimes they are arrested for shoplifting or other less serious offenses. The key is that they learn from those incidents. They are normal juveniles who make an error in judgment and are fortunate enough to get caught and learn their lesson. Delinquents tend not to learn a lesson, other than how to be better at crime in the future.

There is another big difference between delinquents and non-delinquents, and it is the parents.

I will qualify that statement by saying not all delinquents have bad parents, and not all law-abiding kids have great parents. Sometimes how a child turns out doesn't make sense but, for the most part, delinquents come from homes where good behavior is not consistently rewarded and bad behavior is not consistently punished. I realize I am painting with a

broad brush here, but it is, nevertheless, true in many cases. It is also true that hard-core delinquents make up a relatively small percentage of the number of juveniles who are arrested.

Growing up these days is a little like going into battle. There are lots of temptations and pitfalls and sometimes the pull to misbehavior is pretty strong. That is one reason it would be unfair to brand every teenager who makes a mistake, a "delinquent." It takes continued misbehavior that is willful and destructive, with a series of arrests and adjudications, before it's appropriate to call someone a delinquent.

The same is true for adults. There are those who get arrested once, but learn from their mistakes and go on to lead happy, productive, law-abiding lives. Real criminals and delinquents, on the other hand, spurn the law and make uncivilized behavior a way of life. □



Judy La Salle received her undergraduate degree from the University of California at Davis, in Sociology and a graduate degree from California State University at Fresno, in Criminology. She is a retired Division Director with the Merced County Probation Department, having worked as a probation officer for 36 years. Her other work experience includes teaching college, working as a stewardess and working for the Red Cross in Vietnam in 1969-1970. Her e-mail address is judy@justadvice.com or see www.justolder.com



LEGAL SPECIALIZATION SECTIONS
Of LEGAL SECRETARIES, INCORPORATED

MEMBERSHIP APPLICATION / ANNUAL RENEWAL FORM

Complete and mail with your check made payable to LSI, for \$20 for each section, or a total fee of \$75 per year to join all SIX sections simultaneously if an LSI Member, or \$40 for each section or a total fee of \$150 per year to join all sections simultaneously if joining as a non-LSI member.

Mail to: **Margaret Tovar, CCLS, Legal Specialization Coordinator,**
12412 Camilla Street, Whittier, CA 90601-3305

Enclosed is payment of my dues for the fiscal year 8/1/08 through 7/31/09 for the following Section(s). Please check appropriate boxes below for the sections you are joining.

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NAME: MR./MRS./MS. _____

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LOCAL ASSOCIATION: _____ LSA/LPA

RESIDENCE PHONE () _____ BUSINESS PHONE: () _____

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SPECIALTY: _____

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A Day At The Races with San Gabriel Valley LSA

Submitted by
San Gabriel Valley LSA

It was a beautiful day! The tractor slowly circled the track making a perfect surface for the races to come. The clerks were getting ready behind their windows for the crowds who would soon be there. The horses were working out and getting ready for their races. Our group was slowly making its way to the Club Court for our annual Day at the Races! The view of the San Gabriel Mountains is magnificent from the stands at Santa Anita. As the crowds gather, the flags are flying, the horses are cleaned and brushed, and the jockeys are weighed, and colors are worn. Everyone stands as the Star Spangled Banner is played. The bugle call is made and all is ready for another great racing day!

We have been holding this event for the last 36 years at Santa Anita Race Track in Arcadia. We gather the first Saturday in April for a great day of racing, food and friendship. This event is held with no court deadlines and no stress! We enjoy a great buffet before the racing begins at 12:00 noon. The races are held come rain or shine

which can make for an interesting day. The Club Court is just below the Club House and is a separate area from the main grandstand. We have our own betting windows and bar area. Additionally we are in a covered area so we can enjoy any kind of weather in relative comfort. We have been holding our Day at the Races on Derby Day for the last six years. This is one of the biggest days in racing at Santa Anita. This makes it a very special day! Everyone in attendance gets a free t-shirt with all the derby horses on the back. This event brings together our families, friends, bosses, co-workers, vendors and sponsors. All are invited to join in this exciting day. We make our bets and cheer on our favorites.

At the end of the racing day, everyone has enjoyed a day filled with good friends, lots of laughs and great racing. A great opportunity to get to see some old friends and to meet some new ones. Join us this year if you are able and see why we keep coming back year after year! All are welcome! □

Corinne Patera, San Gabriel Valley LSA - Co-President, February 2008 Conference Chairman, Past-President SGVLSA 1999, 2000, 2001, and Bulletin Editor. Employed by Paul, Hastings, Janofsky & Walker LLP in Los Angeles for 20 years. Currently residing in Covina, California with her three children.



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LSI Historian Workshop at LSI Quarterly Conference Mission Inn, Riverside November 15, 2008

The LSI Historian Workshop scheduled for the November 2008 quarterly conference is **“Scrapbooking Doesn’t Have to Be Elaborate – Tips for Keeping it Simple and Within a Budget.”** The workshop will be facilitated by Denise Lopes, CCLS, LSI Historian. Please register prior to the conference to be assured of having a handout. There is no fee for this workshop. Deadline is November 10, 2008. To register by e-mail: denisesaboo@yahoo.com, fax your reservation to be received by the deadline date to (707) 443 2747 or mail your reservation to be received by the deadline to Denise Lopes, CCLS, 1776 Fox Farm Road, Trinidad, CA 95570.

RESERVATION FORM for History Book/Scrapbook Workshop

November 15, 2008 4:00 - 5:00 pm

Riverside, California

Name: _____

Address: _____

Local Association: _____

Email: (For registration confirmation only) _____

Assure yourself of a handout and register by the deadline date. Walk-ins welcome.

Governors – The Bridge Between Local Associations and LSI

Submitted by
San Mateo County LSA



Shara Bajurin has been a member of LSI since 1987, when she joined San Mateo County LSA, and is currently serving her second term as Governor. She works as a legal secretary at Carr, McClellan, Ingersoll, Thompson & Horn Professional Law Corporation in Burlingame, California.

Confused about life? Make a list. Confused about a new volunteer position? Make a chart. That's my way of dealing with the duties of Governor. On the one hand, four times a year I get a bed and a remote control all to myself – no husband watching the Military Channel, no Disney Channel for the kids, and no

dogs hogging my pillow. On the other hand, have you seen all the stuff Governors have to do? It is a long and detailed list. I just had to break it down into easier-to-understand parts if I was ever going to relax and enjoy my weekends away. Hope this helps you enjoy your weekend too.

Conferences:

May Annual Conference
August Quarterly Conference
November Quarterly Conference
February Quarterly Conference

Staying Organized:

- Create an e-mail contact list of your association's "Officers and Chairmen" in order to send e-mails to the group (rather than trying to send each directive to each responding individual).
- Use a spreadsheet to track Chapter Achievement Points all year long.
- Calendar the due date for *The Legal Secretary Magazine* article submission.
- Go to the LSI website often to make sure you have the most current information – <http://lsi.org/>

Pre-Conference Local Association Duties:

- Directives: Obtain, distribute and follow up on responses.
- Voting Direction: Discuss upcoming LSI issues at your local board and association meetings in order to represent your association's position on upcoming votes.
- LSI Notification: Notify LSI Executive Secretary whether association will be officially represented.

Getting There:

- Complete and submit the Conference Registration forms.
- Make your hotel reservation.
- Make all necessary transportation reservations (tickets bought early are usually less expensive).
- Complete and mail the Legal Specialization Section seminar registration.
- Complete and submit the "Notification of Attendance at Board of Governors Meeting."

Being There:

- Step 1: Register. Upon arrival at the Conference, be sure to register. This is where we pick up loads of paperwork to bring back to our Association, agendas, minutes, rules, and (the most important thing of all) the boodle bag.
- Step 2: Buy raffle tickets: Support the hosting association. Bring pre-printed labels to make it easier to get your name on the winning ticket.

(Continued on page 24)

AROUND THE WORLD IN THREE DAYS

WITH

MT. DIABLO LEGAL PROFESSIONALS ASSOCIATION

FEBRUARY 27, 28, & March 1, 2009

LSI QUARTERLY CONFERENCE

HILTON HOTEL

CONCORD, CALIFORNIA



HOTEL REGISTRATION FORM

HILTON CONCORD HOTEL
1970 DIAMOND BOULEVARD
CONCORD, CA 94520
PH: 925/827-2000

NAME: _____
MAILING ADDRESS: _____
CITY/STATE/ZIP: _____
HOME PHONE: _____ WORK PHONE: _____
E-MAIL ADDRESS: _____
LOCAL ASSOCIATION: _____ LSA/LPA (FULL NAME)
ARRIVAL DATE: _____ DEPARTURE DATE: _____

ACCOMMODATIONS: (PLUS APPLICABLE TAXES AND FEES)

- ☐ RUN OF HOUSE - **\$105.00** SINGLE/DOUBLE
- ☐ KING - **\$105.00** SINGLE/DOUBLE
- ☐ DOUBLE DOUBLE - **\$105.00**

PLEASE CALL HOTEL DIRECTLY FOR RESERVATIONS, 925-827-2000. PLEASE IDENTIFY YOURSELF AS BEING A PART OF MT. DIABLO LPA IN ORDER TO GET THE GROUP RATE. YOU MAY ALSO RESERVE A ROOM ONLINE AT WWW1.HILTON.COM.

FOR GENERAL INFORMATION CONTACT:

REGISTRATION CHAIRMAN: CRISTINA GOMEZ, (925) 813-4325, CGOMEZ@ANGIUS-TERRY.COM

CONFERENCE CHAIRMAN: MARIA BISHOP, CCLS, (925) 284-7788, MBISHOPCCLS@PEREZMILLER.COM

HOTEL REGISTRATION DUE BY FEBRUARY 12, 2009



AROUND THE WORLD IN THREE DAYS

WITH

MT. DIABLO LEGAL PROFESSIONALS ASSOCIATION

FEBRUARY 27, 28, & MARCH 1, 2009

LSI QUARTERLY CONFERENCE

HILTON HOTEL

CONCORD, CALIFORNIA

CONFERENCE REGISTRATION FORM

NAME (ON BADGE): _____
MAILING ADDRESS: _____
CITY/STATE/ZIP: _____
HOME PHONE: _____ WORK PHONE: _____
E-MAIL ADDRESS: _____
LOCAL ASSOCIATION: _____ LSA/LPA (FULL NAME) _____

PLEASE CHECK IF APPLICABLE AND INCLUDE TITLE:

☐ STATE OFFICER _____

☐ STATE CHAIRMAN _____

PLEASE CHECK IF YOU ARE:

☐ GOVERNOR ☐ CCLS ☐ PLS

SCRIP (INCLUDES REGISTRATION, WELCOME RECEPTION, BANQUET AND BRUNCH)

POSTMARKED ON OR BEFORE JANUARY 28, 2009	\$85.00	\$ _____
POSTMARKED JANUARY 29, 2009 OR LATER	\$95.00	\$ _____

INDIVIDUAL TICKETS

REGISTRATION BY JANUARY 28, 2009	_____ @	\$ 8.00	\$ _____
REGISTRATION JANUARY 29, 2009 OR LATER	_____ @	\$18.00	\$ _____
WELCOME RECEPTION (FRIDAY)	_____ @	\$ 8.00	\$ _____
GOVERNOR'S LUNCHEON (SATURDAY)	_____ @	\$29.00	\$ _____
PRESIDENT'S LUNCHEON (SATURDAY)	_____ @	\$29.00	\$ _____
MEMBERSHIP LUNCHEON (SATURDAY)	_____ @	\$29.00	\$ _____
SATURDAY NIGHT BANQUET	_____ @	\$40.00	\$ _____
_____ VEGETARIAN MEAL REQUESTED			
SUNDAY BRUNCH	_____ @	\$33.00	\$ _____
TOTAL AMOUNT ENCLOSED			\$ _____

PLEASE MAKE CHECKS PAYABLE TO: MDLPA

MAIL TO: CRISTINA GOMEZ
ANGIUS & TERRY, LLP
P.O. BOX 8077
WALNUT CREEK, CA 94596

FOR GENERAL INFORMATION CONTACT:

REGISTRATION CHAIR – CRISTINA GOMEZ, (925) 813-4325 – cgomez@angius-terry.com

OR CONFERENCE CHAIR – MARIA BISHOP, CCLS, (925) 284-7788 – mbishopccls@perezmilller.com

NO REFUNDS AFTER JANUARY 28, 2009

(Governors, Continued from page 21)

- Step 3: Attend Meetings: Meetings may include Friday Governor's Luncheon, Saturday Pre-Annual Conference Board of Governors Meeting, Saturday night Reception and Banquet, and Sunday Post-Annual Conference Board of Governors Meeting.
- Step 4: Workshops: Attend Legal Specialization Section workshops.
- Step 5: Annual Contests: Check out History Book and Bulletin Displays at the Annual Conference.
- Step 6: Vendors: Visit the vendors and collect their signatures for a special drawing (if offered).

Post Conference:

- Prepare a Governor's Report to submit and present to your local association.
- Distribute reports and information to local association officers and chairmen.
- Send thank-you notes to good speakers, host association, or anyone else who should be recognized.

Annual Governor Duties:

- Confirm that local association president has submitted the Certification of Governor to LSI prior to the May Annual Conference.
- Submit two articles to *The Legal Secretary Magazine* (deadline provided by LSI).
- Track Chapter Achievement Points and submit report prior to the May Annual Conference. □

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The Emotions Of Estate Planning

Submitted by
**Livermore Amador
Valley LPA**



Nancy Hargiss has provided attorney support in Pleasanton, California since 1982, and has specialized in estate planning since 1994. She is currently employed by Randick, O'Dea & Tooliatos, LLP as a transactional paralegal. Nancy is a member of Livermore Amador Valley LPA.

Working for an Estate planning attorney can be a very rewarding experience for the legal professional. We are assisting the client in accomplishing probably the most responsible and caring project he or she can ever undertake. The medical, financial and personal decisions the estate planning client makes now will provide immediate peace of mind for himself or herself, and will relieve the client's family from having to make these decisions in the event of the client's disability or death. A properly drafted estate plan can also prevent the necessity of court intervention when time can be of the essence and the family's financial and emotional resources are already stretched to the limit.

One of the definitions of estate planning that I like comes from wikipedia:

Estate planning is the process of accumulating and disposing of an estate to maximize the goals of the estate owner. The various goals of estate planning include making sure the greatest amount of the estate passes to the estate owner's intended beneficiaries, often including paying the least amount of taxes and avoiding or minimizing probate court involvement. Additional goals typically include providing for and designating guardians for minor children and planning for incapacity.

-http://en.wikipedia.org/wiki/Estate_planning

An estate plan is based on a set of decisions made concerning wealth and personal care for both now and in the future. In addition to the client's property and family structure, the attorney will factor in other things such as the client's age, overall health, and any propensity to participate in

high risk activities; any children that would need a guardian or special care; the existence of other estate plans for the client and for other family members; the existence of separate property of spouses, or property located outside of California or the US; and the existence of prior marriages and/or children from another relationship. [Don't be caught off guard: We did have a client who did not want his spouse to know that he had a prior marriage and that he had two children from that marriage!]

These factors and others will impact the complexity of the estate plan, the time it will take to implement the plan, and the cost of the legal services. It all sounds very technical and dry, doesn't it? But, in fact, in some cases creating an estate plan is a very emotional experience for the client:

The decisions made during the estate planning process will be based on much more than just facts and numbers. Many of the decisions will also be impacted by more subjective, personal information - the family situation, and personal perceptions and beliefs. An effective estate plan will be a product of not just the client's financial worth, but will also reflect the client's:

- Money-management preferences and practices
- Family dynamics and personalities
- Personal skills, responsibility, and trustworthiness of potential appointed agents
- Family traditions and values
- Religion, church, and personal beliefs about tithing, medical care, death, and burial
- The hopes and dreams for the client's future, and for the future of his or her family
- The charities and other worthy causes that the client supports

When deciding who will serve as guardians

(Continued on page 26)

for the children and other agents and legal caretakers, the client will sometimes experience unexpected emotions - love, gratitude, anger, remorse - as he or she considers the personalities involved and past experiences the client has had with these personalities. The client may have conflicting thoughts and feelings that make it difficult to make the required decisions, and that can cause repeated revisions to the estate plan. The client may also have to overcome certain family taboos and address certain delicate issues head-on, such as discussions about death, or of the family black sheep, which might cause some degree of discomfort. The client might find out that his or her spouse differs on certain "touchy" issues.

Many a family squabble has erupted right there in the conference room, and tearful phone calls are not unusual.

Under these circumstance, we as the legal professionals must be sensitive to the emotional state of the client. We are interacting with a person who is facing his or her own mortality, who is examining his or her life's accomplishments, and who is re-evaluating his or her hopes and dreams for the future. Added to all this emotion is the stress of digging through records, contacting banks and other institutions, and researching family information that the client is required to do. Deathbed planning adds the tragic element of impending mortality to the mix, as well as the inherent sense of urgency. As in all circumstances in the law office, in dealing with our clients we must be patient and good listeners and we must be supportive and encouraging.

We also must cater to their idiosyncrasies! Estate planning clients' demands can often seem emotional and/or unreasonable, but our cooperation will lead to a satisfied client with a better estate plan. The client is well aware that a hasty or unwise decision made now can have devastating financial and personal effects in the future, so he or she wants to get it just right. We should be prepared to type ten pages of barely legible handwritten detailed descriptions of personal property for special gifting. We must be willing to research the identity and location of "that charity somewhere in Utah that provides food

and firewood to Navaho elders." We should not be surprised when we occasionally have to work late so that the last-minute client can sign before he or she goes on that one-month vacation that has been planned for over two years. And we should expect to be asked by the client to change the order of the five appointed health care agents and alternates more than once while he or she waits in the conference room to sign. All this extra effort on our part makes for a happy client (and therefore a happy boss) and a better estate plan.

Of course, not all of the emotions that the client might experience will be negative: The estate plan is an opportunity

for the client to express love, trust, gratitude, and support for those appreciated individuals. Special gifts can be made to loved ones, or to worthy causes; and the client has the opportunity to provide for someone with a special need, or who is particularly deserving. Besides providing peace of mind for the client and the client's family, the well-drafted estate plan will contribute to the family legacy.

I don't want to give the impression that all estate planning clients turn into an emotional train wreck during the process.

On the contrary, my experience has been that nearly all remain pleasant and reasonable throughout the entire process. And God bless the occasional client who walks in the office knowing exactly who all the agents will be, has completely and legibly filled out the questionnaire, and has brought clean copies of all the required documentation. My all-time favorite client was one who did all of the above, and she had only just turned 21 years old! What a delight it was to work with her!

As we all know, estate planning clients certainly do not have a corner on the market when it comes to experiencing emotions during the legal process. But sometimes there are more deep-seated personal issues involved in estate planning that require just a little more sensitivity and just a little extra effort on our part. When we rise to the occasion the rewards are great, and we can come away knowing that we have helped our clients plan for their futures and their families in a caring and responsible way. □



LSI Quarterly Conference 2008

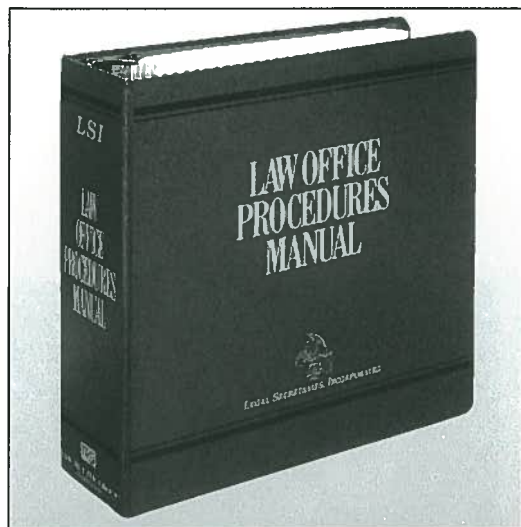
Legal Secretaries Incorporated held its 2008 First Quaterly Conference at Holiday Inn – San Jose from August 22-24, 2008. The “Lazy Daze of Summer” was well attended and everyone caught up with old friends and acquaintances, attended educational seminars and workshops, enjoyed the balloon popping fun at banquet, and the Honorable Edward Lee’s motivational presentation.



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Meal and Rest Periods Take a Break But How Long Will it Last?

Submitted by
Long Beach LSA

Scott Dauscher is a partner of Atkinson, Andelson, Loya, and Ruud & Romo. In 2006, 2007 and 2008, Mr. Dauscher was named a "Southern California Rising Star" by Law & Politics and Los Angeles Magazine. Mr. Dauscher received his B.S. in Political Science from California State University, Dominguez Hills, and J.D. from Loyola Law School, Los Angeles.

Christopher Milligan is an associate with the law firm of Atkinson, Andelson, Loya, Ruud & Romo and practices primarily in the areas of employment and labor law, as well as construction and general business law. Mr. Milligan earned dual B.S. degrees in Political Science and History from University of California, San Diego, in 1996. He received his J.D. from University of Southern California in 2000.

Sun Hi Ahn is an associate of Atkinson, Andelson, Loya, Ruud & Romo. She focuses on employment law and defense of management in personnel and labor relations matters. Ms. Ahn received her B.A. from University of California, Berkeley and earned her J.D., cum laude, from American University in Washington D.C. Ms. Ahn also holds a Master's degree from Hahnemann University in Philadelphia, Pennsylvania.

In recent years, employers in California have been the target of wage and hour class actions brought by current or former employees who claimed that they were denied meal or rest periods by their employer. Employers faced with these lawsuits often had little choice but to settle the claims because courts offered little relief, often allowing the lawsuits to proceed even though they were not based on common sense or the realities of the workplace.

Among the questions raised by these lawsuits was whether employers must force employees to take meal periods, or whether they simply need to make them available to employees. In *Brinker Restaurant Corp. v. Superior Court*, employers learned that at least one California Court of Appeal agrees that meal periods need only be made available to employees. Employers need not force meal periods upon employees.

The Brinker court also addressed other important issues, including whether claims for missed meal and rest periods, and off-the-clock work are appropriate for class treatment. In a victory for employers, the court concluded that they were not appropriate for class certification.

Background

Brinker operates numerous restaurants throughout California, including Chili's, Macaroni Grill and Maggiano's Little Italy. The plaintiffs, restaurant employees, filed a class action lawsuit on behalf of all of Brinker's hourly employees claiming that they were denied meal and rest breaks, and had to work "off the clock," among other wage and hour claims. In opposing the plaintiffs' motion for class certification, Brinker provided evidence that it had a written policy of providing meal and rest periods and that employees took meal and rest periods. The trial court, however, still certified a class of approximately 60,000 current and former Brinker employees. Brinker appealed the decision to the Court of Appeals.

Summary of Ruling

In short, the *Brinker* court concluded that:

- While employers cannot impede, discourage or dissuade employees from taking rest periods, they need only provide, not ensure, rest periods are taken;
- Employers need only authorize and permit rest periods every four (4) hours or major fraction thereof, and they need not, where impracticable, be in the middle of each work period;
- Employers need not provide a meal period for every five (5) consecutive hours worked on a "rolling basis;"
- While employers cannot impede, discourage or dissuade employees from taking meal periods, they need only provide, not ensure meal periods are taken; and
- While employers cannot coerce, require or compel employees to work off the clock, they can only be held liable for employees working off the clock if they knew or should have known they were doing so.

Class Action Issues

In considering whether a class action was appropriate for the meal and rest period claims, the *Brinker* court concluded that because meal and rest periods need only be made available, and not "ensured," the question of whether employees were provided meal and rest periods must be considered on an employee by employee basis. Based on the evidence presented by Brinker, including statements from some employees that they did receive their meal and rest periods, the court found that these claims could not be resolved through a class action.

In addition, the court concluded that the "off-the-clock" claims were also not amenable to class treatment. This is because individual

(Continued on page 30)

issues predominated as to whether *Brinker* forced employees to work off-the-clock, whether *Brinker* changed time records, and whether *Brinker* knew or should have known employees were working "off-the-clock."

What Brinker Means For Employers

The *Brinker* decision provides some needed guidance and assistance to California employers facing wage and hour lawsuits. However, it should not yet guide employer's actual employment decisions. First, the California Supreme Court may still review the *Brinker* decision. If it does, the decision cannot be relied upon by lower courts. There remains a possibility that the California Supreme Court could overrule the Court of Appeal. Second, although the *Brinker* decision distinguished the cases, there are several other California appellate decisions from different appellate districts (*Cicairos v. Summit Logistics, Inc.*) which still suggest that employers must ensure employees take meal periods. Third, plaintiffs may try to distinguish *Brinker* in

cases where the employer does not have proper policies or where the evidence shows that employees are not provided meal and rest periods.

In short, until it becomes clear that the California Supreme Court will not review, or has affirmed, the *Brinker* decision, employers should continue to enforce their meal and rest period policies and record meal period start and stop times. Notably, rest periods need only be "authorized and permitted" and need not be recorded. For those employers currently facing meal and rest period claims or off-the-clock claims, however, *Brinker* provides some needed assistance. *Brinker* now provides employers with arguments to defend against class actions when they have clear written policies providing meal and rest periods to employees and prohibiting unauthorized "off-the-clock" work, as well as other evidence demonstrating that meal and rest periods are taken and that unauthorized "off-the-clock" work is prohibited. □



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Are You a Mentor?

Submitted by
Humboldt County LPA



Leslie Ames has been a legal secretary since 1998, is a Notary Public, and obtained her California Certified Legal Secretary (CCLS) designation in 2003. She has been a member of Humboldt County LPA since 1999, has held numerous chairmanships within the Association, was President fiscal years 2003-2005, and has represented HCLPA as Governor since 2005. She works for William R. McClendon and John M. Anderson in Eureka, in the areas of Probate and Estate Planning, Trust Administration, Real Estate, and Corporate and Business Law.

Leslie has been married to her husband, Shorty, since 1987, has five cats and is an avid trail runner. In May, she completed her first 50k ultra trail run in Portland, Oregon, in memory of her mom.

Take a look around you. In your everyday life, your work life, your social life, who's watching you? Your child? A co-worker? The young man bagging your groceries at the supermarket? The young woman helping you at the department store? Every day, and at many moments throughout the day, we have the opportunity, known or unknown, to mentor someone, be it for a lifetime or a brief moment.

There are four specific women whom I have been blessed to have as mentors. Each one in their own way has opened my eyes to the possibilities of my life, to the rewards of persevering even when you want to quit, and to obtaining a dream that seems out of reach.

Marlene Birnie came into my life in November 1987, a few short months after I married and moved to Humboldt County. I had begun working as a receptionist in my first law office and it wasn't long before Marlene befriended me and became not only a surrogate mother but a good friend. Always quick to laugh and share a joke, she was a stronghold for me during some very hard times. With no family at the ready, I turned to Marlene often during my year of working with her, and many times since, for her level-headed and thoughtful advice. When my mother died, Marlene's steadfastness and compassion helped pull me through a treacherous storm. I am sure she never considered herself as being a mentor, but she was. I learned from her the importance of being there when a person is in need; of not just offering verbal support, but a shoulder and an ear; of allowing people to have their hurts and pains, while at the same time letting them know when they are ready they will be there. She is a remarkable human being who has done much to help me mature into the woman I am today.

Catherine Culver, CCLS came to work at our office as a temp while I was on vacation. Upon my return, her temporary position was turned into

a full time position, and thus began what I know will be a life-long friendship. We complemented each other in so many ways during the time we worked together, each not minding certain jobs and duties that the other disliked. It was a great partnership.

Without a doubt, Catherine is *the reason* I am where I am today with regard to my profession and why I have accomplished so many goals. She is the consummate professional, and from day one, intentionally or unintentionally, began developing in me a desire to become a better legal secretary. It was Catherine who encouraged me to study for the CCLS exam, along with four other members of our association. It is Catherine who told me, "Yes, you can do it!" when I was asked to run for president of our association, and then provided me with much needed support and advice in her capacity as governor. It was Catherine who applauded and encouraged my decision to run for governor of our association, and it was Catherine who continued that encouragement when I was considering the position of LSS Probate/Estate Planning Section Leader.

Catherine not only instilled in me a desire to continue improving myself professionally, but also showed me the importance of *looking* professional, as well. She is the one who, without words, made me understand that if you want to be treated with respect and as a professional, then you must dress the part, and that first impressions are important. I will forever be grateful for the impact she has had on my life.

I met Denise Lopes through the CCLS study group in which I was encouraged to participate. Our friendship developed slowly within the group, but blossomed over the past few years when we began traveling together to conference, she as LSI Historian for Mary Rocca, and me as Governor of Humboldt County LPA.

(Continued on page 38)

Legal Terminology Crossword Puzzle



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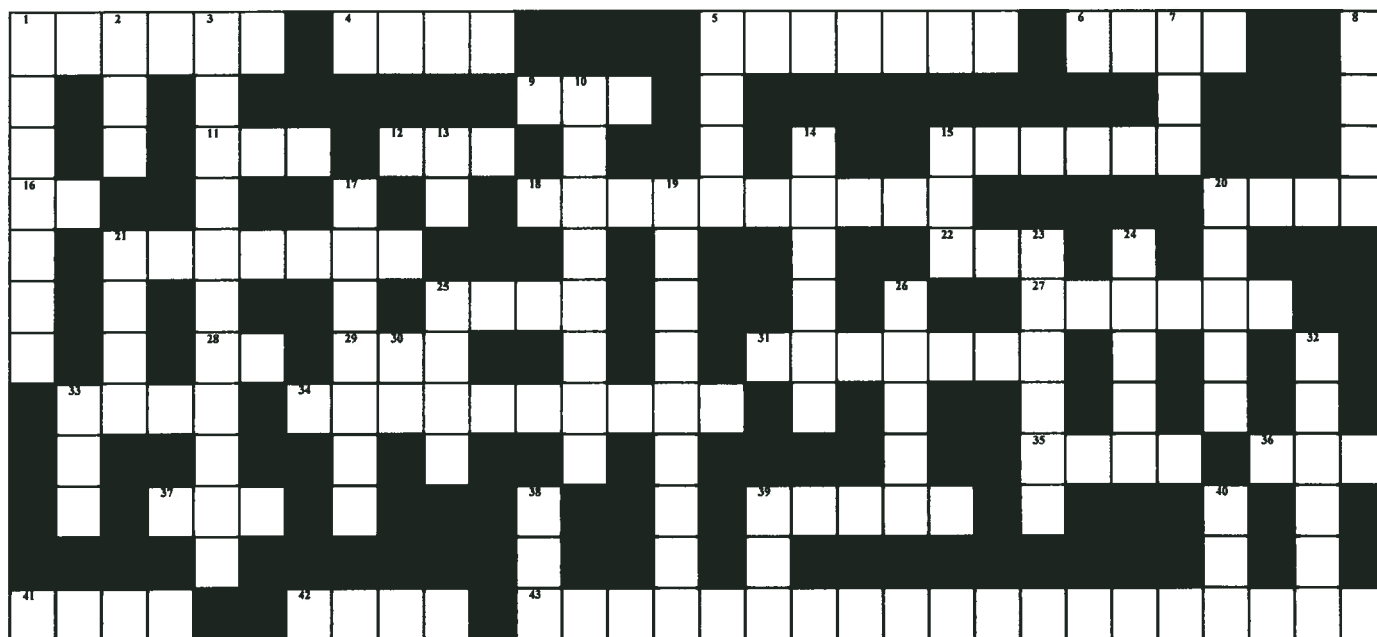
Los Angeles Legal Secretaries Association

Reyna has been a litigation secretary since 1980.

In 1996 she joined the Los Angeles office of McKenna Long & Aldridge where she is secretary to three government contract attorneys and floor coordinator.

For over a decade, Reyna has enjoyed her dual positions as Scholarship and Advertising Chairperson for LALSA.

Reyna earned her CCLS status in 2001.



Across:

- 1: California has six districts in the Courts of _____
- 4: Plaintiff cannot file a complaint at a later date, on the same matter, if a Dismissal _____
Prejudice is filed
- 5: A type of reminder system
- 6: A compilation of statutes
- 9: Proof that a document has been electronically filed is referred to as this (Fed.R.Civ.P. 5(d)(1))
(initialism)
- 11: The members of the legal profession (collectively)
- 12: Court's Electronic Case Filing system aka this (initialism)
- 15: Caveat, means "let him _____"
- 16: The same (Latin)
- 18: Type of mail sent from one computer to another
- 20: Except for exhibits, all original documents electronically filed must be _____ searchable
- 21: Plaintiff may bring another legal action at a later date, based on the same facts, if a Dismissal _____
Prejudice is filed
- 22: Identifies an internet address as a commercial address
- 25: An agreement between parties, through their counsel (abbrev.)
- 27: When filing electronically, these proposed documents should ALWAYS be submitted as attachments
- 28: In Latin, _____ *litum* means for this suit/litigation and _____ *hoc* means for this special purpose
- 29: Attorneys attempt to settle cases at these court hearings (initialism)
- 31: Failure to answer a complaint
- 33: Proofreader's mark to instruct the writer to disregard a change the editor had previously marked (Latin)
- 34: The second district in the Courts of Appeal
- 35: An affidavit or statement is usually made under this
- 36: Next of _____ identifies a relative of a party who has died intestate
- 37: Individuals do not file criminal charges in U.S. district courts, this does (abbrev.)
- 39: On a pleading, the title of this must be on line 8 or below
- 41: A shortcut to another website
- 42: Metadata means "_____ about data" or information describing the history, tracking or management of an electronic document
- 43: Request that a judge not allow a prospective juror as a member of the jury (two words)

Down:

- 1: Versus
- 2: Documents filed in USDC Central must be in this format and have a size limitation of <5MB (initialism)
- 3: Procedure by which a lawsuit may be resolved by a person who is not a judge, at an informal hearing
- 5: A civil wrong or injury other than a breach of contract
- 7: A defendant whose true name and capacity are unknown at the time the complaint is filed is referred to as this
- 8: Notice to Pay Rent or what alerts a tenant that the landlord is threatening eviction
- 10: Three are used to omit words or sentences within quoted materials; four are used at the end of a sentence
- 13: There are one Chief Justice and six Associate Justices in this state's Supreme Court (abbrev.)
- 14: The case number assigned in the clerk's office is aka the _____ number
- 15: Indicates someone is receiving a copy of a letter without the addressee's knowledge (initialism)
- 17: The purpose of this document is to notify defendants that a legal action has been filed against them
- 19: I will not contest it: *nolo* _____ (Latin)
- 20: Federal Court: Manually filed documents are submitted electronically within how many days thereafter
- 21: A court order requiring the performance of a specific act
- 23: A request to the Court for an order or a ruling
- 24: Judicial council may approve (optional) or _____ (mandatory) legal forms
- 25: Documents that you _____ can generate larger file sizes than electronically generated PDF documents
- 26: An electronic public access service that allows users to obtain case information from Federal courts (acronym)
- 30: *Silicet* (the heading of an affidavit, which gives the venue) (abbrev.)
- 32: Legal Secretaries Inc.'s website
- 33: Indicates that an incorrect or unusual spelling is not a transcription error
- 38: Zoning Improvement Plan: Established in 1963, a system of five-digit codes (acronym)
- 39: According to _____ 2030, a party may propound to another party 35 specially prepared interrogatories (initialism)
- 40: In property law, _____ simple is the most complete form of ownership of land

(Answers on page 38)

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APPLICATION

Please complete and mail this form to the following address with your check to reserve your place at one of the examination venues:

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Deadline: Application must be received 60 days prior to examination date. A late application may be accepted up to 30 days prior to the examination if submitted with a \$25 late fee, in addition to the fees listed below, if space is available.

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Summary of Duties _____

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Summary of Duties _____

I certify that I have completed this application truthfully. I understand that a false statement may result in the revocation of my certification. I understand and agree that the contents of the examination are confidential and are not to be discussed. I understand that my employment record will be verified by a member of the California Certified Legal Secretary Certifying Board.

Signature of
Applicant _____

Date _____

I Wish I Knew Then What I Know Now

Submitted by
Sacramento LSA

At a recent Executive Board meeting of the Sacramento Legal Secretaries Association (SLSA), we were notified by our President, Elicia Allen, CCLS, that LSI was giving associations the opportunity to write an article for the November 2008 LSI magazine. As Madame President Elicia made the announcement, I sat there listening to the silence around the table and with no one offering to volunteer, I said how about an article "I wish I knew then what I know now." Of course I rolled my eyes and before I could say I was just kidding, everyone said "Yeah that's a great idea!! You could write an article about when you were a member and what it's like to be on the Board." Hence my story of "I wish I knew then what I know now" started.

First, here is a little background about myself and how I got involved in Sacramento LSA.

I started attending the meetings of SLSA in 1986 and was a member on and off from 1987-1998. I have been an ongoing member since 2000. In 2005, I finally decided it was time to become more involved with the association rather than just being a member and a face in the crowd. For family reasons, I had to wait for the right time. I started by picking-up in mid-year 2005, the chair of Historian. I did not realize what a big deal it was to create such a book for the President, how many people would be looking at it and that the book would be submitted for judging at Annual Conference. Once I was notified of all that, panic kicked in. I had created little cheesy albums in the past for my kids and family, but never got into the scrapbooking thing. I just created very simple albums so this was a real challenge for me. I survived, created the album with the help of other board members and had one finished for Annual Conference and for presentation to Dawn Willis, our President at the time.

In May of 2006, I accepted the role of Advertising Chair. This turned out to be the perfect chair for me! If you don't know me, I am

not terribly shy and will walk right up to someone and introduce myself and the association I am with. To me it is very exciting to meet people in the same profession or field, to hear about their experiences, and to tell vendors what our local association offers and how they can gain exposure by advertising in our monthly newsletter and on our website and, of course, advertising with LSI. While holding the Advertising Chair, I never attended a Board meeting – well, maybe once I did, but looking back, I should have! Maybe I would not have complained about where the meeting was held, how I did not like the food, or that there were not enough topics that interested me enough to attend. If I had just gone to a board meeting I could have offered suggestions on these things or hear why those things were chosen. I also would have found out what work goes into creating a great and successful association. To be able to listen to the brainstorming of upcoming or future educational classes, or how we can get more members and how to get our employers to see how valuable membership is for their staff to be a part of the local association and LSI.

Some things that I never thought about as a member are listed below, in no particular order:

1. How much work goes into putting on the monthly general meetings. It's one thing to secure a conference room or restaurant but to get the speaker lined up with their topic, mail/fax the flyers to members about the meeting, food brought in or ordered and to coordinate with the restaurants the total number of meals and how many dishes of an entrée is needed, making sure that there is audio/visual equipment, that all the chairs have their reports ready, marketing items are brought, gifts for the speakers, etc., all of this just for ONE meeting! As a member, I never realized that a simple thing like getting in my reservation "early" for a monthly general dinner meeting would really help



Terry Olson-Skeahan is the lead secretary/assistant at Bartkiewicz, Kronick & Shanahan and has been employed with them since April 2000. In 2005, Terry began to volunteer for Sacramento LSA and was Historian and Advertising Chair. Now, in 2008, Terry is Treasurer, Day In Court, Historian and Budget Co-Chair, and Advertising Chair. Terry enjoys cooking, gardening, walking and vacationing at Irish Beach, CA. She has three children, Marisa 15, Amber 11 and Carson 7. Terry also plays softball on a co-ed team in Rancho Murieta. She was born and raised in Sacramento and has lived in Rancho Murieta since 1996.

(Continued on page 36)

the person handling registration and being able to call in the count for meals when the restaurants request us to do so. I guess they have to plan how much wait staff they should have, how to set up the tables and let us not forget that they have enough ingredients for those delicious meals they prepare.

2. The thought and creativity that each person on the Board is trying to come up with to keep people interested as a member, to figure out what we can do to get more employers to support their staff in attending either a CCLS class, monthly meetings, lunch lessons, conferences and fun events for members and non-members so that they can sometimes include their families.
3. The time that each person on the Board donates to the Association and to the legal community. These people, and now myself included, attend board meetings, attend other associations' meetings, volunteer and/or attend interclub events with other legal groups (e.g., Bar Association Bench-Bar Receptions, USDC Eastern District District of California events), and any other events or meetings that they feel are beneficial in promoting our local association.

I ask myself, "How in the world did I have the right to complain about my local association's events, programs, etc. without ever getting involved?? Why didn't I even get but just a little involved?" Well, I do have some legitimate excuses like many of you, I am sure.

For me, it was family issues. In 1993, I had a set of twin girls and one passed away at the age of 10 months due to Cerebral Palsy. I was not ready to get involved for a very long time because of that. I had another child in 1997 who was healthy and happy and then my last child, my son, was born in 2001 with some extreme mental and physical handicaps. He is now doing so much better - thank goodness - and is well enough where I can go to conferences and meetings without worrying or feeling guilty and thinking "what if something happens while I am gone to another city?" My time had come. I could finally get involved with the people who form Sacramento LSA.

People ask me, and I will admit to doing this, that when I complain there is already not enough time in the day (and we know we all do it), why I complain. I guess my answers would be that 1) I am a person. Not just a mom, wife, or legal

assistant all the time. I actually do have other interests in life and there is nothing wrong with that; 2) I am growing as a person by being involved in the world; 3) I am giving back to my legal community what it has given me over the years; 4) I am showing my employer and myself how important it is to stay educated in the legal field for them and for myself; 5) I am showing my two daughters that you can do whatever it is that you like to do as an adult on top of being a mommy, chauffeur and clothes shopper; and 6) the personal fulfillment I get when someone walks up to me and says "Wow, you ladies did a great job!"

I think I am fortunate enough to belong to one of the largest associations in LSI. My peers are women who I admire and have a deep respect for. Not that I didn't before, it's just now I know how much of their time and effort they give to Sacramento LSA. They have shown me the ropes like no one else could have. They lend me a hand when I need help or guidance in my role as Treasurer, Advertising, Day-in-Court, and Budget Chair, and Co-Historian. They offer me support when I feel like I can't figure out how to get a job done in a timely fashion and most importantly, they understand when I say, "I

have to go to my kids' softball game or Girl Scout event or my son's doctor's appointment." Or the occasional "My husband is going to be real upset with me if I am not home that night as I promised I would be." They all say, "No worries, we'll be fine."

I thought being a member of Sacramento LSA was pretty cool all those years prior to being on the Executive Board and to be able to go to meetings and take occasional classes or attend events they offer. Now it is even more awesome because I help with those things. I am ready to support my association, Board and the chairpersons of SLSA. Plus, I can say to someone at conference or a monthly general meeting - "Hello, my name is Terry Olson-Skeahan! I am the Treasurer, Advertising Chair, Day-in-Court Co-Chair, Co-Historian, and Budget Chair of SLSA! What do you do?"

I know I have a full plate. Nevertheless, I enjoy it. My advice to anyone is get involved when you are ready. Only "you" will know when that time comes. Give a little if you can to support your association. Speaking as a member and as a board member, we appreciate ANY time that is given. Remember, no time is too little. □



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Denise is a small but mighty force. She will defend you to the end, but will also, in her quiet way, let you know when perhaps the decisions you are making or the actions you are taking are not the most prudent. Not one to speak out of turn, she quietly observes and gives grounded, well thought out advice, and I have turned to her often for that advice. I have learned much from Denise about guarding one's tongue and really, truly thinking before opening one's mouth. She, too, has taught me much about being a true professional, as well as nurtured my desire to continue to improve myself in my profession, and has helped guide me to an understanding of, "If you put your mind to it, you can accomplish anything." She has been a very calming presence in the midst of some stormy times in my life these last few years, and she has taught me the true meaning of friendship.

Last, but most assuredly not least, is my mother, Yualene Gleason. Words cannot begin to describe this truly remarkable woman. Although not diagnosed until a number of years later, my mother became afflicted with rheumatoid arthritis, along with two other types of arthritis, at age 22 after having two children she was told she could never have. For years I watched this disease wreak havoc on her body, putting her through unimaginable, agonizing pain. Through it all, her goal, and desire was to protect her children, to not let the disease rob my brother and me of our mother, and when she had grandchildren, not rob them of their grandma. She was

a woman of unwavering faith in her religious belief, and never once did I hear her ask, "Why me?" Through surgeries, infections, hospitalizations, tortured and twisted hands and feet, my mother bore her pain and suffering with grace and dignity.

Over the years, many people have expressed to my family that it was my mother's grace, dignity, selflessness, and compassion toward others that helped them through their own times of trials and tribulations.



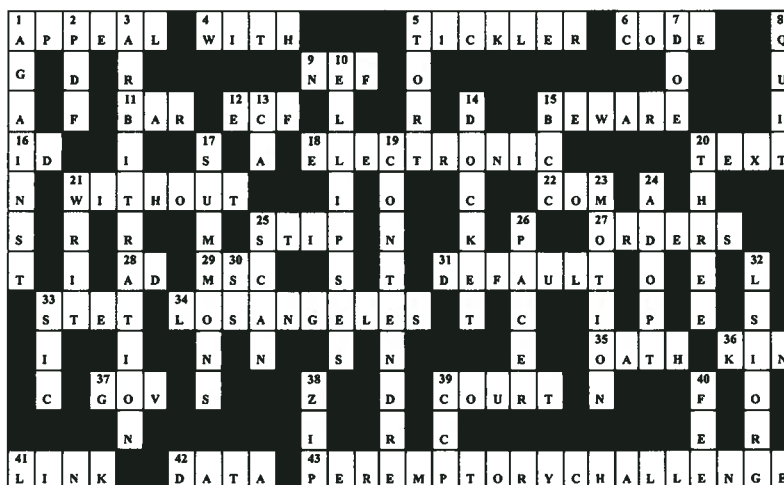
My mother died in 1989 when I was 23 years old, just as we were embarking on a new, and what I am sure would have been a wonderful, adult mother/daughter relationship. To this day, I feel the hole that her passing has left in my life. However, in the short 23 years we had together, she taught me the true meaning of humanity, compassion, and love, and to never give up no matter the obstacles or the pain. As I write this, I am about to embark upon my first 50k ultra trail run, 31.06 miles. A distance my mother could never have comprehended being able to walk, let alone run.

I will cross that finish line because of her.

All four of these women my mom, Marlene, Catherine, and Denise have touched my life, been my mentors; mostly, I am sure, unintentionally. I am honored to have them in my life, and to each of them I will forever be grateful and thankful.

Every day we have the opportunity, knowingly or unknowingly, to mentor someone, be it for a life time or a brief moment. Take a look around you. In your life, who's watching you? □

ANSWERS



A Message From The Editor

Editor,
The Legal Secretary



Deborah Rickert, CCLS is editor of The Legal Secretary and President of Orange County LSA. She has been a legal secretary for 25+ years, and worked at Latham and Watkins LLP for over 10 years. Deborah is secretary to two partners and a senior associate doing civil and patent litigation.

Deborah is married to Johnny and they enjoy traveling all over the world. She is a native Californian and has lived her entire life in Southern California.

I would like to thank everyone who contributed to the August issue of *The Legal Secretary*, and those who contributed to this issue as well. I am very pleased at the contributions we've received, as well as the support I have received in putting together the magazine. Special thanks to Patti Mires, CCLS, whose help is endless and invaluable.

As announced at the Post Governors meeting, Christa has asked to see more articles about "us," the LSI members in our magazine. If your association has a special event, please share it with all of us by submitting an article and photographs to be included in the next issue. While I look forward to receiving your articles, please keep in

mind that guidelines have been set to ensure this magazine maintains its integrity and professionalism. Those guidelines were distributed at the Post Annual Governors meeting at the Annual Conference. Each association is assigned to submit both a governor and guest writer article for one issue during the fiscal year. If your associa-

tion is assigned for a particular quarter, please do your best to contribute at least one article. If it's possible to get a second article submitted, that would be great! Don't forget, for each *printed* article submitted by a guest writer, an association earns 100 Chapter Achievement Points. For each *printed* article by a governor, an association earns 50 Chapter Achievement Points. So, keep those articles coming.

The associations assigned for the November issue of *The Legal Secretary* are:

Imperial County,
Livermore-Amador
Valley, Long Beach,
Los Angeles, Marin
County, Merced
County, Monterey
County, Mt. Diablo,
Napa County, Orange
County and Palo Alto.

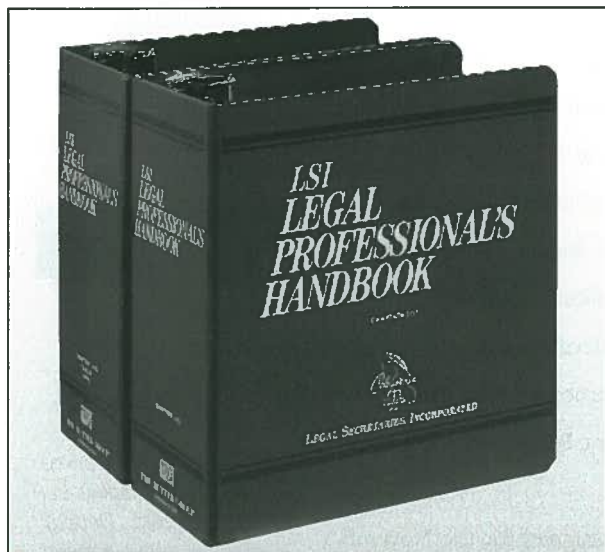
Submissions are to be received no later than December 1st and are happily accepted prior to this deadline. In addition to your articles, I also need to receive a photograph of the author, short biography and a completed Checklist. Please feel free to contact me for a full set of the Guidelines or checklist. □



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December 1, 2008	Deadline for submission of articles for February issue of <i>The Legal Secretary</i>
January 20, 2009	Deadline to submit application to take March CCLS Examination
January 28, 2009	Deadline to postmark February conference registration to receive discount
February 1, 2009	Deadline for submission of articles for May issue of <i>The Legal Secretary</i>
February 12, 2009	Deadline to make hotel reservations for February conference
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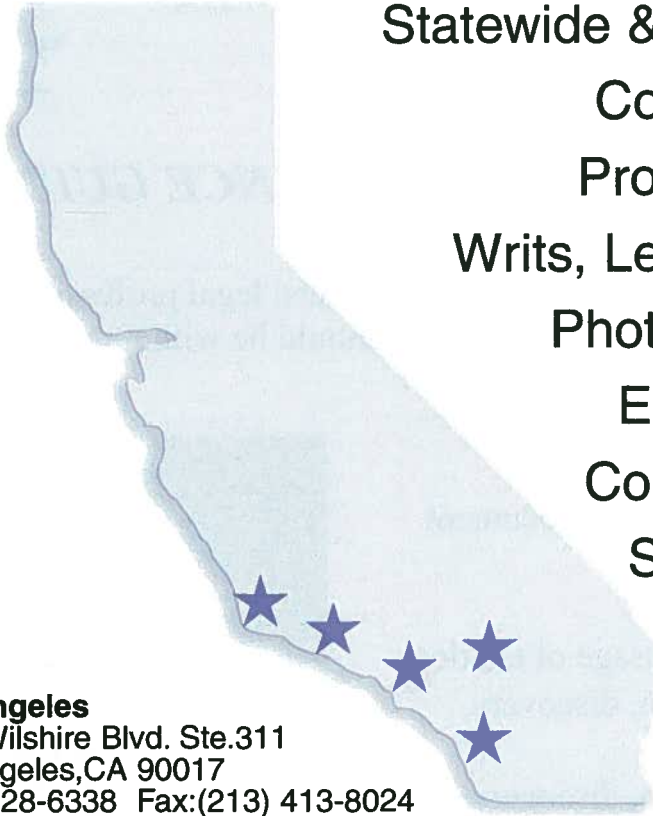
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